

Clerical Encounter Observation Guide

Agency _____

Staff Name _____ Language _____

Some skills to listen and watch for:	Observations: Specific examples you heard or observed
<ul style="list-style-type: none">▪ “Spirit” of PCS: shows genuine warmth; respectful; accepting and non-judgmental; avoids “should”, “need to” ▪ Opens the conversation/ greets the participant ▪ Affirms participant ▪ Asks some open-ended questions ▪ Listens and allows time for participant to talk ▪ Summarizes what participant has said ▪ Handles difficult situations ▪ Other:	

An approach to providing positive feedback:

- ✓ How do you feel the encounter went?
- ✓ What do you think went well?
- ✓ What might you do differently next time?
- ✓ Here are some examples of things I heard you say.....
- ✓ Use as an opportunity to affirm skills staff are already using

Getting Down to the Details of Clerical Encounter Observations

- ▶ What are the specific participant centered services skills I could listen for?
- ▶ What are some examples of what each one might sound like in a real WIC visit?

PCS Skill	Examples
“Spirit” of PCS: warmth, respect, acceptance, non-judgmental	[Clerk accepts participant for who they are and what their interpretation of the world may be, even if she doesn’t agree with it; avoids saying “you should, you need to”; shows genuine warmth]
Opens appointment/greets the participant: Clerk starts off appointment by greeting the participant and taking steps to build rapport with participant.	Hi – Nice to see you. How can I help you today? Welcome to WIC! What can I do for you?
Affirms participant: Clerk seizes appropriate opportunities to make (genuine) affirming statements. (Probably the single most important skill to master!)	Thank you for bring in all that documentation. You’re already a step ahead of the game! Your baby looks so cute! You really take good care of her. I am so glad you could make it today.
Uses open-ended questions: Clerk uses open-ended, non-judgmental questions to engage participant.	What have you heard about using your WIC vouchers?
Listens and allows time for participant to talk: The “talk time” is balanced between the clerk and the participant.	[Clerk listens attentively to the participant and allows the participant to complete their answer and then asks appropriate follow up questions.]
Summarizes: Clerk summarizes what has been said and asks for feedback to see if she has correctly identified participant’s concerns.	So Linn, let me make sure I understand. You have vouchers for Similac for this month and next month, but the doctor wants to change Tommy over to Alimentum. You don’t have the medical documentation form but the doctor said they would fax it over yesterday. And you have your vouchers with you. Did I miss anything?
Handles difficult situations: Clerk recognizes resistant behaviors and listens to the participant, acknowledges what has been said, shows empathy and avoids arguing, interrupting, negating, or ignoring what has been said.	[Clerk listens to participant.] It sounds like you have had a rough morning. I am sorry to hear of all the challenges you experienced getting here. Let’s get you checked in so we can get you seen as soon as possible.



Oregon WIC Listens